



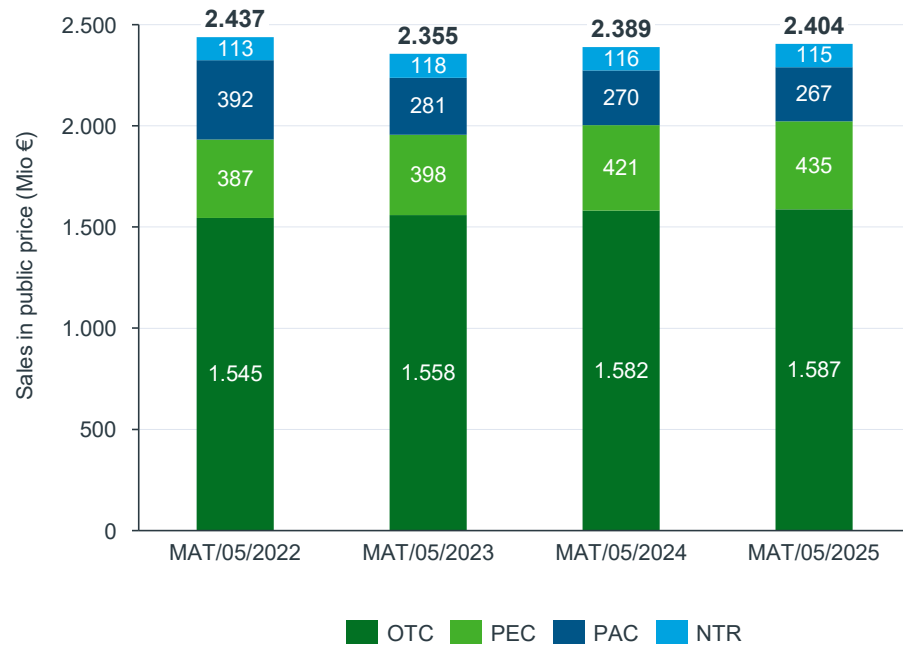
Monthly Belgium and Luxembourg Market Trends May 2025

- + Belgium: Retail
- + **Belgium: Consumer Health**
- + Luxembourg: Retail

The Belgian retail market is worth € 2.4 billion

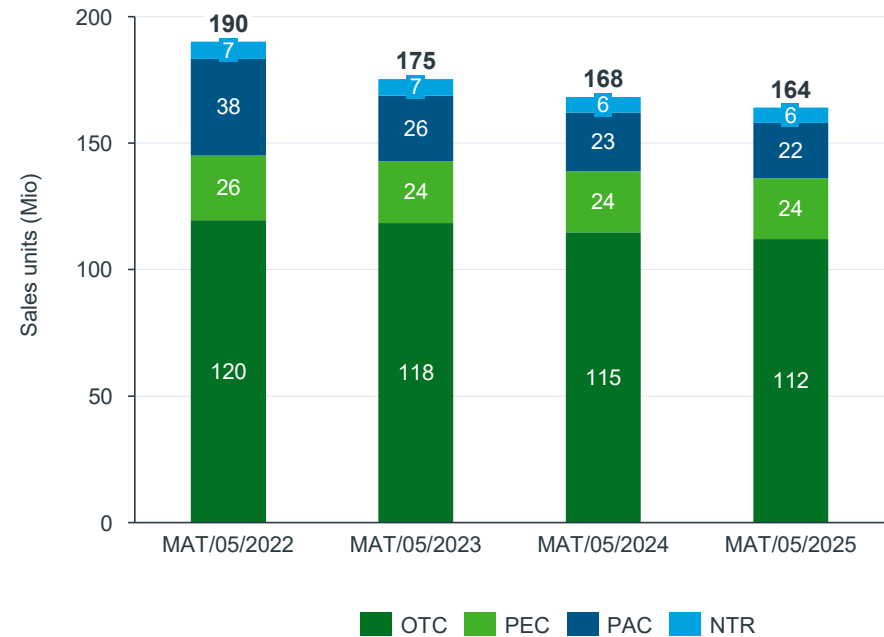
Sales Evolution

VALUE



Sales Evolution

UNITS

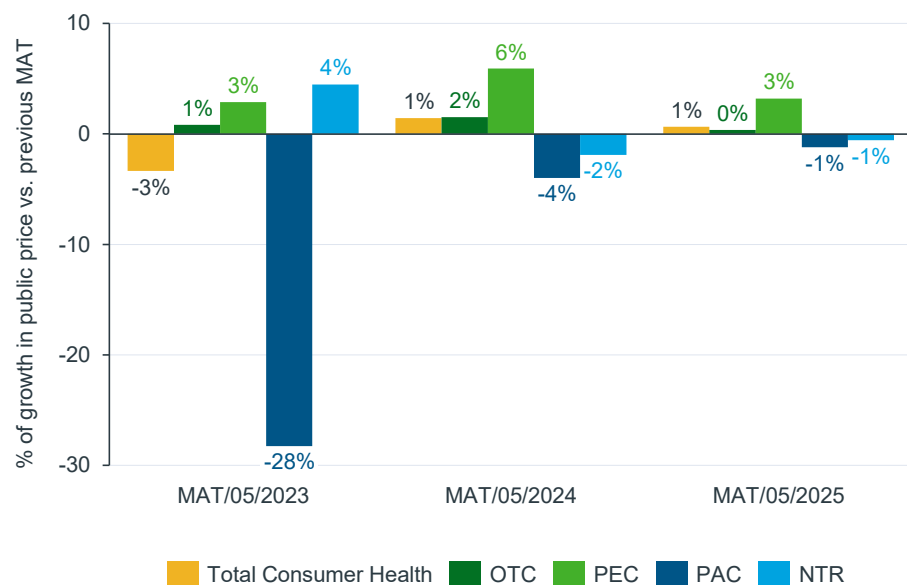


Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows an increase of 01%, while Patient Care declines with -01% and in units, the CH market shows a decrease of -02%, while the OTC declines with -02%

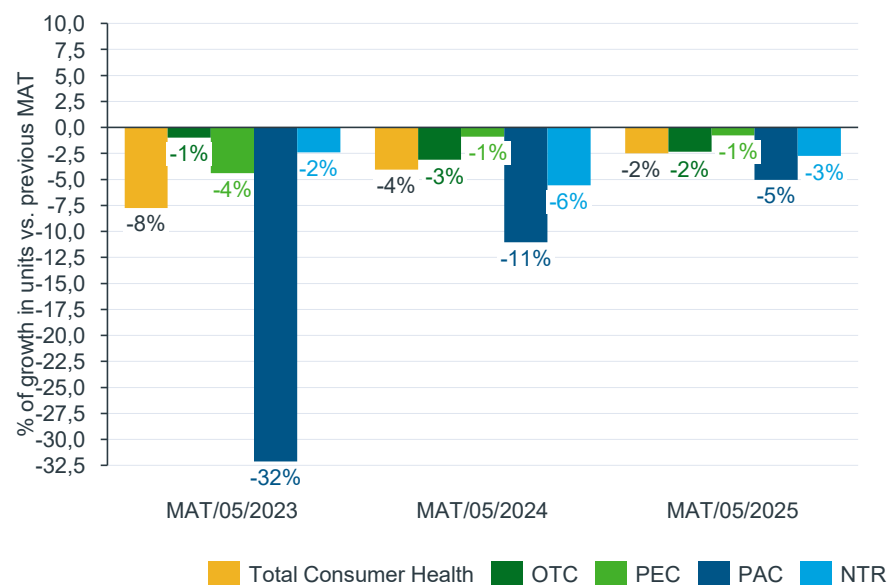
% of growth versus previous MAT

VALUE



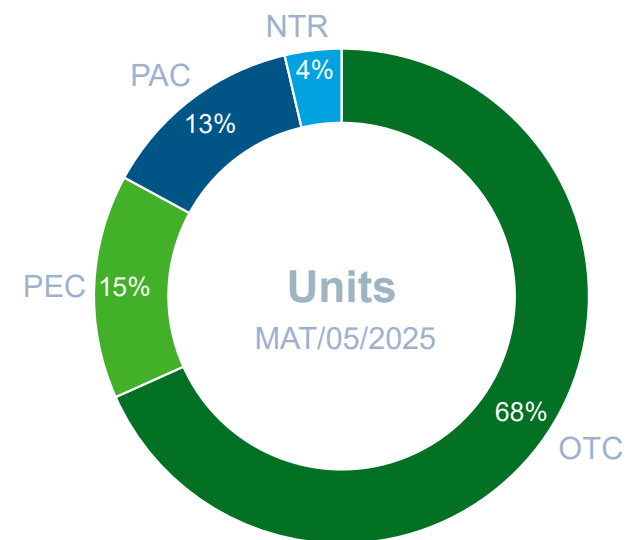
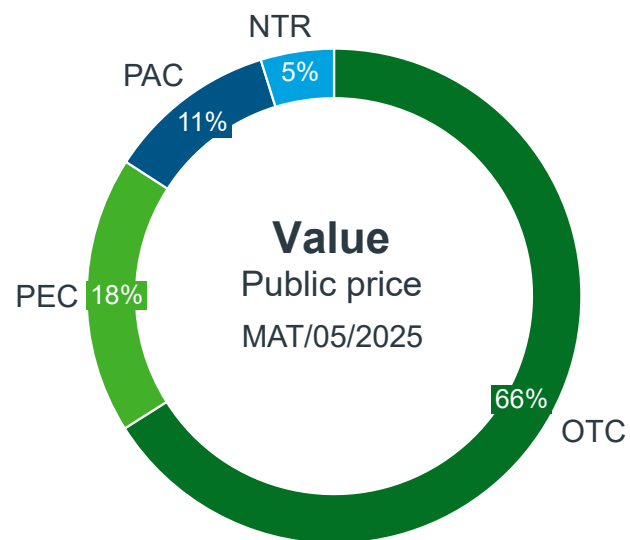
% of growth versus previous MAT

UNITS



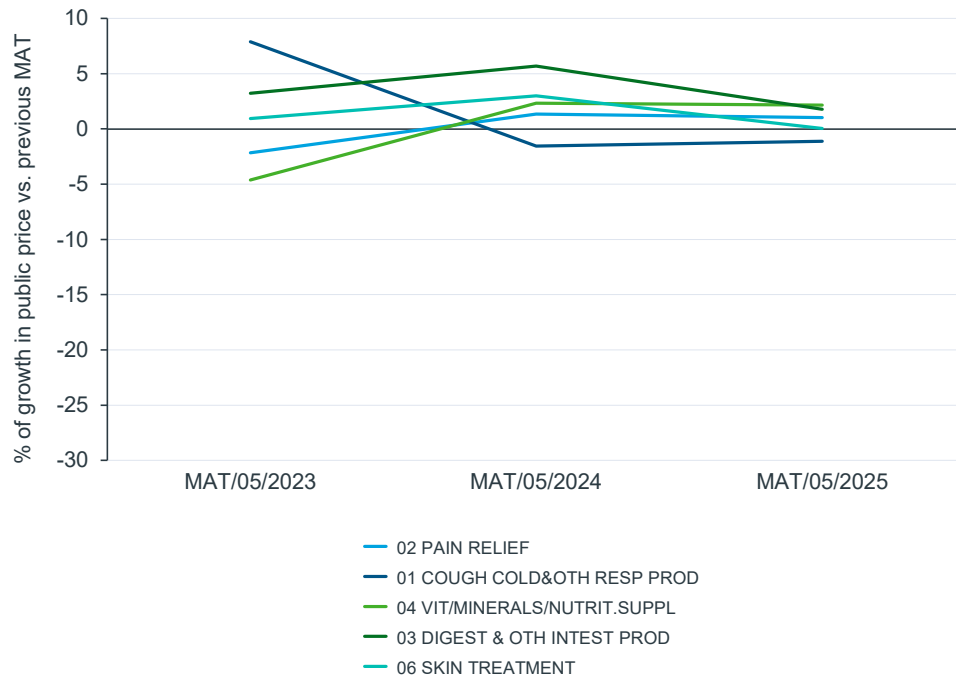
OTC segment has a market share of 68% in units and 66% in value of the total CH market

Market Share

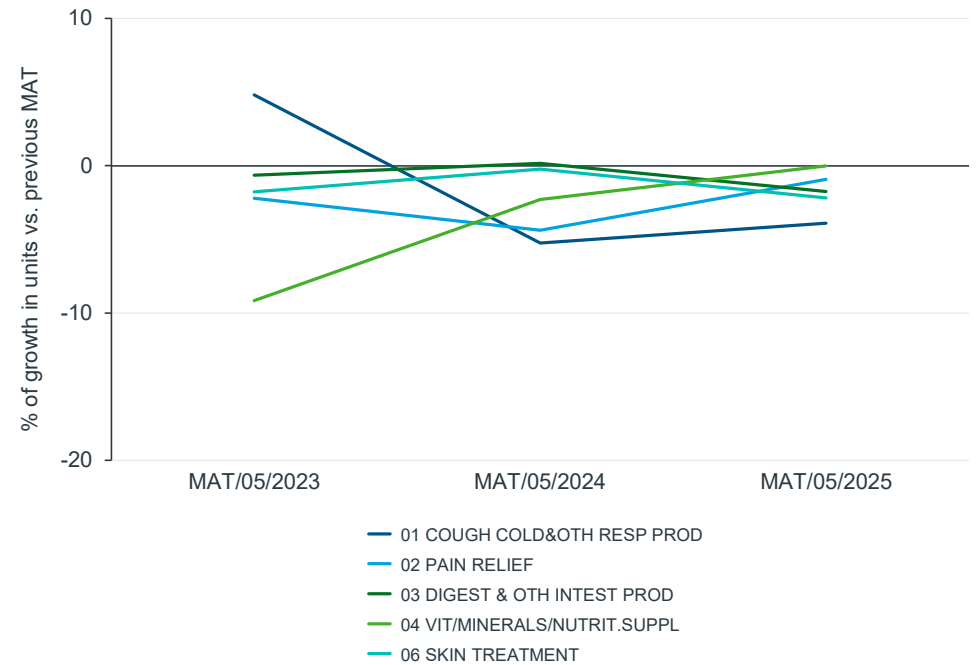


Top 5 classes sales evolution

% of growth versus last MAT
VALUE



% of growth versus last MAT
UNITS



The top 10 best selling OTC2 classes in CH in units and value

Top 10 Best Selling OTC2 classes in retail VALUE public price



	Pub/EUR MAT/05/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	195 M €	8.1%
01B COLD REMEDIES	99 M €	4.1%
07A EYE CARE	87 M €	3.6%
01A COUGH PRODUCTS	83 M €	3.4%
04F MINERAL SUPPLEMENTS	80 M €	3.3%
35G MILK PRDS FOR CHILDREN	70 M €	2.9%
03C LAXATIVES	66 M €	2.7%
13A CALMING AND SLEEPING PRODUCTS	65 M €	2.7%
02E MUSCULAR PAIN RELIEF	64 M €	2.7%
04E OTHER SPECIFIC VITAMINS	63 M €	2.6%

Top 10 Best Selling OTC2 classes in retail UNITS (= number of packs)



	UN MAT/05/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	19,529,070	11.9%
01B COLD REMEDIES	11,021,468	6.7%
01A COUGH PRODUCTS	7,578,019	4.6%
01C SORE THROAT REMEDIES	5,857,272	3.6%
07A EYE CARE	5,182,530	3.2%
03C LAXATIVES	4,795,506	2.9%
04E OTHER SPECIFIC VITAMINS	4,024,409	2.5%
02E MUSCULAR PAIN RELIEF	3,307,783	2.0%
04F MINERAL SUPPLEMENTS	3,075,870	1.9%
03D ANTIDIARRHOEALS	2,997,437	1.8%

Emerging Trends: Top 10 Consumer Health classes showing Growth in Units and Value

Fastest Growing OTC1 in Rx sales in % growth in VALUE ex-mnf



	Pub/EUR MAT/05/2025	Absolute growth in value	% growth
54 BABY DISPOSABLE & CH ENU	3 K €	1 K €	40.7%
52 INCONTINENCE CARE PRDS	1274 K €	339 K €	26.7%
39 OTH NUTRITIONAL PRODUCTS	4 K €	1 K €	25.0%
45 FIRST AID KITS	3 K €	0 K €	10.8%
06 SKIN TREATMENT	21477 K €	1879 K €	8.8%
97 ALL OTHER MISCELLANEOUS	1861 K €	148 K €	8.0%
82 BEAUTY PRODUCT FOR WOMEN	3559 K €	267 K €	7.5%
09 MOUTH TREATMENT PRODUCTS	2820 K €	183 K €	6.5%
83 UNISEX BEAUTY PRODUCTS	8602 K €	515 K €	6.0%
79 OTHER PATIENT ARE PRODS	3466 K €	182 K €	5.3%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/05/2025	Absolute growth in units	% growth
54 BABY DISPOSABLE & CH ENU	182	82	45.4%
39 OTH NUTRITIONAL PRODUCTS	338	86	25.5%
45 FIRST AID KITS	238	52	21.8%
06 SKIN TREATMENT	2,124,312	147,655	7.0%
82 BEAUTY PRODUCT FOR WOMEN	130,781	5,590	4.3%
65 BABY+NURSING ACCESSORIES	1,942	75	3.8%
04 VIT/MINERALS/NUTRIT.SUPPL	3,786,537	139,694	3.7%
35 BABY FOODS	213,194	5,528	2.6%
79 OTHER PATIENT ARE PRODS	91,624	2,353	2.6%
83 UNISEX BEAUTY PRODUCTS	448,483	10,579	2.4%

The top 10 fastest growing Consumer Health classes in growth (units and value)

Fastest Growing OTC1 in Rx sales in % growth in VALUE ex-mnf



	Pub/EUR MAT/05/2025	Absolute growth in value	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	75.5 M €	3.8 M €	5.1%
06 SKIN TREATMENT	21.5 M €	1.9 M €	8.8%
03 DIGEST & OTH INTEST PROD	52.2 M €	1.2 M €	2.3%
10 CIRCULATORY PRODUCTS	36.4 M €	1.1 M €	3.1%
01 COUGH COLD&OTH RESP PROD	73.8 M €	1.1 M €	1.5%
02 PAIN RELIEF	63.4 M €	0.9 M €	1.5%
53 PRDS FOR BLADDER PROBLEM	27.5 M €	0.9 M €	3.3%
13 CALM SLEEP MOOD ENHANCING PROD	15.6 M €	0.7 M €	4.3%
83 UNISEX BEAUTY PRODUCTS	8.6 M €	0.5 M €	6.0%
35 BABY FOODS	9.5 M €	0.5 M €	5.1%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/05/2025	Absolute growth in units	% growth
06 SKIN TREATMENT	2,124,312	147,655	7.0%
04 VIT/MINERALS/NUTRIT.SUPPL	3,786,537	139,694	3.7%
83 UNISEX BEAUTY PRODUCTS	448,483	10,579	2.4%
13 CALM SLEEP MOOD ENHANCING PROD	740,934	8,993	1.2%
09 MOUTH TREATMENT PRODUCTS	302,177	5,826	1.9%
82 BEAUTY PRODUCT FOR WOMEN	130,781	5,590	4.3%
35 BABY FOODS	213,194	5,528	2.6%
53 PRDS FOR BLADDER PROBLEM	363,327	5,168	1.4%
12 URINARY AND REPRUDUCT CARE	976,414	3,142	0.3%
79 OTHER PATIENT ARE PRODS	91,624	2,353	2.6%